Program Information Platform for Ecosystem Restoration (PIPER) Performance Report System User Manual

2021

GULF COAST ECOSYSTEM RESTORATION COUNCIL
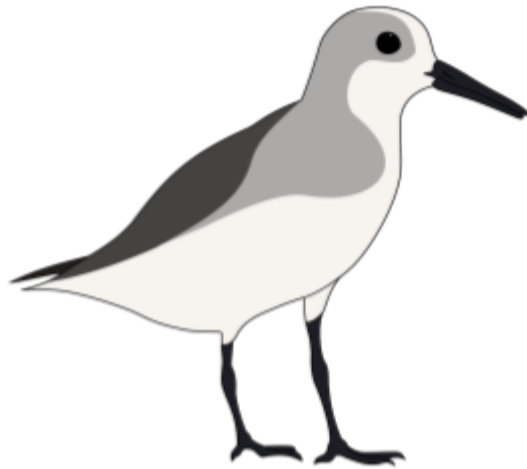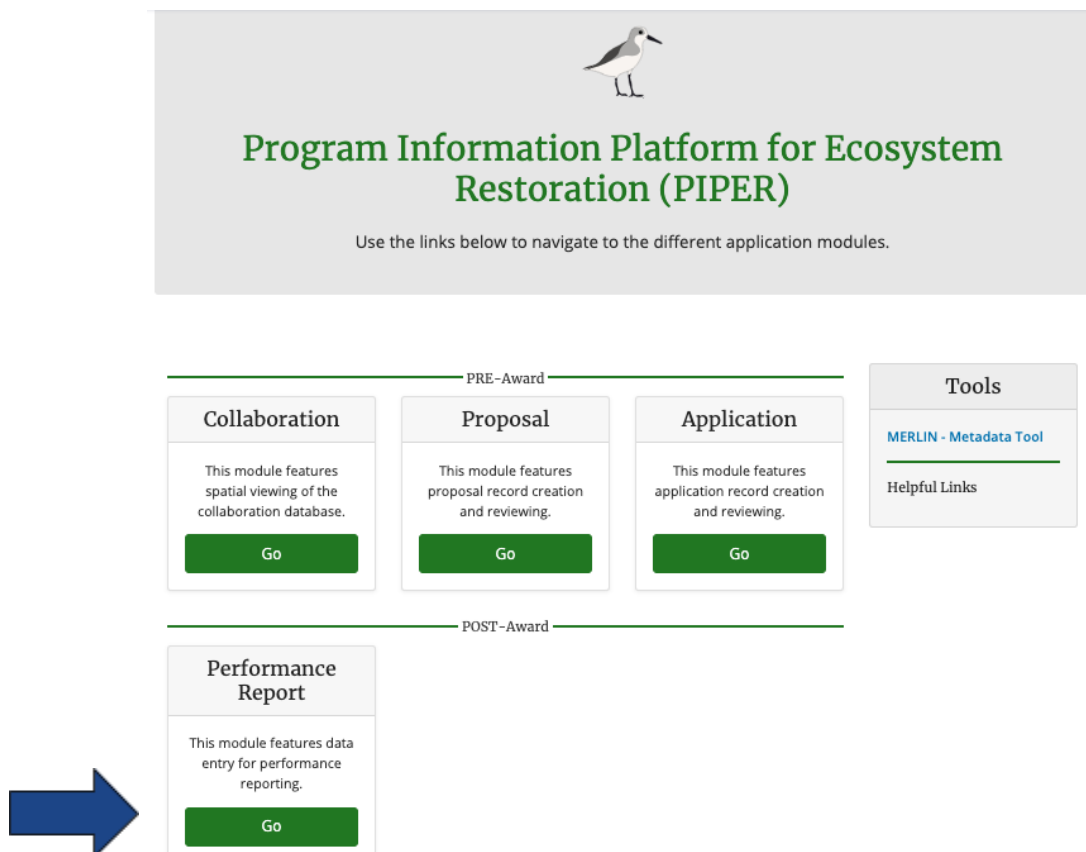
Version 1.6 - June 2021

Table of Contents

Introduction

This guidance is intended to assist Gulf Coast Ecosystem Restoration Council (RESTORE Council) award recipients in creating and submitting annual award Performance Reports in the Council's Program Information Platform for Ecosystem Restoration (PIPER). Performance Reports are to be submitted in PIPER in addition to the Financial Reports that are submitted through GrantSolutions.

Getting Started

To begin the Performance Report Submission process, please log into PIPER at https://www.restorethegulf.gov/apps/piper. If you are unable to log into PIPER please contact the RESTORE Council helpdesk (helpdesk@restorethegulf.gov).

Upon logging in, select "Go" under the "Performance Report" module box as shown below.

Creating a Performance Report

Step 1: Select the Post-Award tab at the top of the webpage. This will present you with two options: "View Performance Reports" and "Create Performance Report." Select "Create Performance" to begin.

Step 2: You will then be taken to a page with a dropdown list titled "Select an Awarded Application" containing the awarded projects and programs for your agency. Once an awarded application is selected, details about that award will be displayed under "Application Details", including the application title, abstract, activity type, and requested funding amount. After selecting the appropriate application from the "Select an Awarded Application" dropdown, click the green "Create Performance Report" button in the bottom right of the page.

You will then be brought to a blank Performance Report, which includes a series of tabs, all of which will be explained in further detail in designated sections of this user manual. Some information in these tabs will be pre-populated with information submitted in your selected award application. You may save your progress by clicking the green "Save" button at the bottom of the Questions tab to enable you to return to your report if need be. You can return to an incomplete report by selecting "View Performance Reports" under the Post-Award tab on the top of the webpage. Select the pencil icon next to the report you want to edit, allowing you to resume performance reporting.

Performance Reporting Questions

The following questions are included as part of the Questions tab in the Performance Report. Please answer Yes, No, or N/A and provide explanations in the note sections where appropriate.

1. Is the project on schedule?

If "No", please provide an explanation for why the project or program is not on schedule.

2. Are there any goals that may not be fully accomplished or metric targets that may not be met within the award time?

If "Yes", please provide an explanation of the goals and/or metric targets that may not be met, and the reason.

If "YES" can those goals be accomplished and metric targets met with a time extension, modification of milestone dates, or other adaptive management strategies?

If "Yes", please indicate whether you have communicated this to Council staff. Select "No" if you need to have further discussion with Council staff.

3. Please describe any adaptive management strategies you have implemented or plan to implement to help accomplish project goals and meet metric targets, including a time extension and/or modification of milestone dates. Please also be sure to update this information in the milestones reporting, if appropriate.

4. The metric values for your project are shown to the right. Update the "current" value for all metrics, as appropriate. Select "Yes" if you have updated your metric's "Current" values. Select "No" if there is no change to your metric values. Please see the Metrics Information section of this User Guide for additional guidance on updating your metric values.

5. Have you begun collecting observational data? In the text box, please provide a brief description of the observational data you have begun collecting.

6. Are you on schedule to perform all data collection activities described in your ODP? (Observational Data Plan[1]) If no, please provide an explanation for why you may not achieve the data collection goals outlined in the ODP submitted with your project/program award. If no, please also describe any plans to revise your ODP given this information.

7. Have you submitted an updated ODP? Answer "Yes" if you have uploaded an updated ODP, containing new or revised information, with this performance report. In the text box, provide a brief description of any updates made to the ODP.

8. Is your ODP up-to-date? To answer yes, your ODP should accurately reflect all the information available about your planned and/or ongoing data collection and management activities, including the timing and schedule for data collection and management.

If "no," briefly describe the needed revisions and indicate when an updated ODP will be provided.

9. Is there information needed to complete your ODP that is still unavailable or TBD?

If "yes", when do you expect this information to be available?

10. Are your data publicly available?

If "no," when and how it will it be shared?

If "yes," how and where is it accessible? Is the associated metadata record in the Council's metadata record tool (MERLIN) up-to-date?

To assist with meeting the Council's metadata standard requirements, the Council provides an ISO-19115 compliant metadata record creation tool called MERLIN. Details about creating and editing metadata

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[1] Projects using the ODP template released with the ODP Draft Interim Guidance will have a separate Data Management Plan (DMP). For these projects, reporting instructions that refer to the ODP should be taken to refer to both the Observational Data Plan and Data Management Plan. As of the release of the 2021 ODP Guidance, the DMP template is supplanted by the electronic ODP form, which includes fields for all information formerly provided in the DMP. Projects using the electronic ODP form released in 2021 will not have a separate DMP.

11. If you have developed any deliverables, reports, or publications (manuscripts in refereed journals, presentations, etc), have they been uploaded to PIPER?

12. Leveraging information for your project is shown to the right. Do you need to update your leveraging information?   If yes, update the leveraging information, as appropriate.   Please see the Leveraging Information section of this User Guide for additional guidance on updating your leveraging values.

13. If co-funding has been identified for this project, are you on target to receive those funds?

14. Have you updated your GIS files?

If "yes," please describe what changed and why.

15. Have you met the requirements of any special award conditions applicable to this performance period?

If "Yes", please provide a description of the special award condition requirements addressed.

16. Is this a CPS-funded project? CPS stands for Commitment and Planning Support. CPS awards were granted as part of the Council's Commitment and Planning Support Funded Priority List. If your award is a CPS award, the title of your record will begin with "Commitment and Planning Support." Please see Appendix A for additional information on completing a performance report for a CPS awards.

If your award is not a CPS award, you may answer "No", and leave the remaining two boxes of the Performance Report blank.

17. Please provide a summary of work completed under this award during this performance period.

Provide a brief summary of activities conducted under this award during the previous performance year.

Metrics Information

1. **Application Metrics:** This area displays the Metrics selected in your project/program application along with the last previously updated "current" values for each (i.e., if you have previously completed a Performance Report). As a reminder, a description of Metrics can be found here. Note: If your Metrics have not pre-populated from your application or a previous Performance Report please contact helpdesk@restorethegulf.gov.

2. **Update Current Metric Value:** This allows you to update the "Current" value for each Metric included in your project/program award.

3. **Current:** Enter the current numerical status for this metric.

4. **Performance Report Metrics:** This displays the updated Current value(s) for each of your Metrics, when they were last updated, and by whom. The Approval Status can be either Pending, Approved, or Rejected. Pending indicates that either your Performance Report has yet to be submitted or that the RESTORE staff are still reviewing your submitted Performance Report. Approved indicates that your updated Current value(s) have been reviewed by RESTORE staff and were accepted. Rejected indicates a problem with the Performance Report. In this case the RESTORE staff will reach out to the Report Point of Contact via email regarding the next steps.

Leveraging Information

1. **Application Leveraging:** This displays the Leveraging identified in your application along with the last previously updated values for each (i.e., if you have previously completed a Performance Report). Note: If your funding has not pre-populated from your application or previous Performance Report, or you need to add or delete a Leveraged Fund please contact helpdesk@restorethegulf.gov.

2. **Edit Leveraging:** This allows you to update your Leveraging information.

3. **Funding Amount:** Enter the updated total leveraged funding amount for the funding source described below. Note: Decimal value cannot have more than 2 digits after the decimal.

4. **Funding Type:** Use the drop-down menu to select the type of leveraging you are describing. The types of funding available are:

   Co-funding: Costs will be shared across funding from two or more sources. The leveraged funding from all sources is required in order to achieve the project or program objective. In cases where co-funding is to be used, the commitment of such leveraged resources is required prior to award of Council-Selected Restoration Component funds. There may be an exception to this rule in cases where a project could be scaled down in the event that the anticipated co-funding did not materialize. In such cases, the Council would need to consider whether an FPL amendment and/or award amendment would be needed to address the change in project scale;

   Adjoining: Activities are proposed in a location that adjoins another existing or proposed project. Geographic proximity is key to this type of leveraging of resources across projects;

   Builds on other work: The project builds upon activities completed or ongoing as part of other projects or programs but is not captured by either of the other two types of leveraging.

5. **Source:** Indicate the name of the agency/organization providing the leveraging funds.

6. **Source Type:** Use the drop-down menu to select the source type for the resources that may be leveraged with your activity.

7. **Status:** Use the drop-down menu to select the status of the leveraged funds being described. Options are Proposed (funds that have been proposed and may be provided in the future), Committed (funds that have been committed to be received for the activity), and Received.

8. **Description:** Provide a brief narrative for the leveraging funding information you are providing.

   Use the light grey square in the bottom right-hand corner of each text box to pull down and expand to desired size for better visibility and ease of writing.

9. **Performance Report Leveraging:** This displays the updated Leveraging information for each of your leveraged funds, when they were last updated, and by whom. The Approval Status can be either Pending, Approved, or Rejected. Pending indicates that either your Performance Report has yet to be submitted or that the RESTORE staff are still reviewing your submitted Performance Report. Approved indicates that your updated Leveraging information has been reviewed by RESTORE staff and were accepted. Rejected indicates a problem with the Performance Report. In this case the RESTORE staff will reach out to the Report Point of Contact via email regarding the next steps.

Uploads
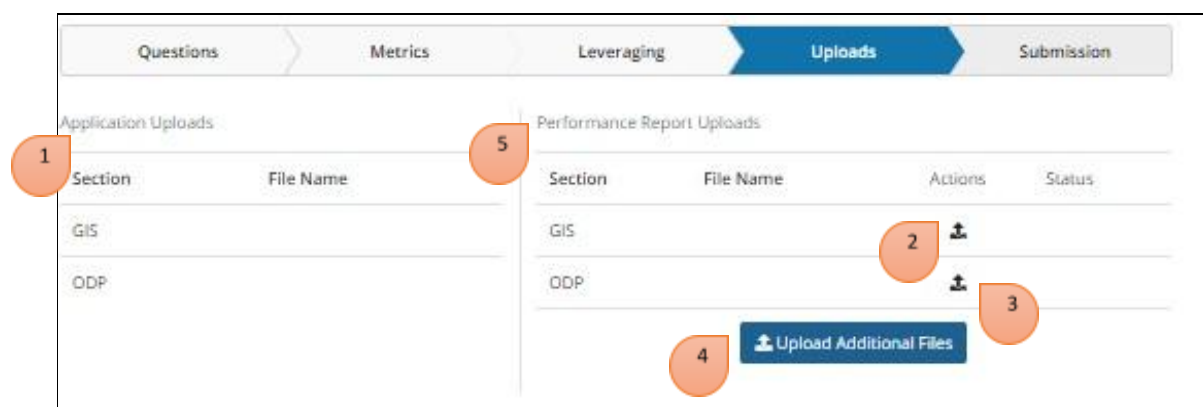
1. **Application Uploads:** This displays the GIS and ODP files uploaded in your application or files you've uploaded since (i.e., if you have previously completed a Performance Report).

2. **Upload GIS Files:** Clicking this icon allows you to upload updated GIS files. Files types can be either .7Z or .ZIP.

3. **Upload ODP[2] Files:** Clicking this icon allows you to upload an updated ODP. Files types can be .PDF, .DOC, or .DOCX.

4. **Upload Additional Files:** Clicking this button allows you to upload additional files which may not fall in the GIS or ODP categories, such as reports, additional details about work conducted during this performance period, or the CPS award required metrics upload (See Appendix A for more information). Files types can be .PDF, .DOC, .DOCX, .7Z, or .ZIP.

5. **Performance Report Uploads:** This section allows you to upload new files and displays newly uploaded files. The Approval Status can be either Pending, Approved, or Rejected. Pending indicates that either your Performance Report has yet to be submitted or that the RESTORE staff are still reviewing your submitted Performance Report. Approved indicates that your updated files have been reviewed by RESTORE staff and were accepted. Rejected indicates a problem with the Performance Report. In this case the RESTORE staff will reach out to the Report Point of Contact via email regarding the next steps.

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[2] Projects using the ODP template released with the ODP Draft Interim Guidance will have a separate Data Management Plan (DMP). For these projects, reporting instructions that refer to the ODP should be taken to refer to both the Observational Data Plan and Data Management Plan. For example, the DMP should be uploaded with the ODP file. As of the release of the 2021 ODP Guidance, the DMP template is supplanted by the electronic ODP form, which includes fields for all information formerly provided in the DMP. Projects using the electronic ODP form released in 2021 will not have a separate DMP.

Submission

When you are finished with your Performance Report click "Submit Performance Report". Your Performance Report will then be forwarded to RESTORE staff for review. Your report will either be accepted or rejected. If rejected the report will be opened back up to you automatically by RESTORE staff and you will receive an email detailing next steps.

Viewing Performance Reports

Within PIPER select the Post-Award tab at the top of the webpage. This will present you with two options: View Performance Reports and Create Performance Report. Click "View Performance Reports" to view or edit your report(s).

1. Search: You can search your reports by title using the search box next to "App Name".

2. Edit: Select the pencil icon next to the report you want to edit. This will bring you to the report editor. If you need assistance with anything within the report editor, look for the corresponding section within the "Create Performance Report" portion of this manual.

3. Print: Select the printer icon next to the report you want to print. This will create a downloadable Word document file of your report.

4. Delete: Select the bin icon next to the report you would like to delete. Note: You will be able to delete a Performance Report record until the report is submitted. Please be careful, not to select this icon, if you do not wish to delete the record.

You may also view Performance Reports within the Application record for your award. To do so select "Applications" from the navigation bar at the top of your screen.
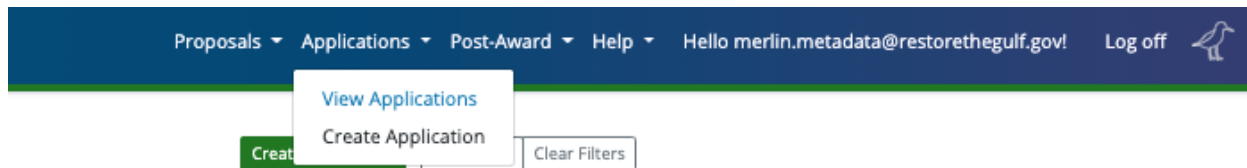
This will pull up a list of the awards and applications submitted by your organization or agency.

1. Search: You can search your awards by title using the search box next to "Title".

2. View Award: To view details about a specific award, including performance reports, select the "eye" icon next to the appropriate award. This will pull up the award record.

3. View Performance Reports: To view a list of all performance reports submitted under this award, select "Performance Reports" at the top right of your screen.

Appendix A: CPS Award Performance Reporting

Commitment and Planning Support (CPS) projects are projects that were funded in the Council's 2017 Comprehensive Plan Commitment and Planning Support Funded Priorities List (2017 CPS FPL).

The Performance Report form for CPS awards does not differ from other FPL or SEP award Performance Report forms. However, your responses on the Performance Report for CPS awards will be different. On the next pages we provide an example of how a CPS award Performance Report may be completed and submitted.

In accordance with the reporting requirements outlined in the final 2017 CPS FPL, the following are requested as part of your annual CPS Performance reporting submission:

1) Annual Performance Report Narrative Upload

Please upload in PIPER a performance narrative describing CPS-funded activities that have taken place.

2) CPS Metrics Reporting Upload

As part of the award annual reporting requirements please upload to PIPER an accounting of any collaborative actions, meetings, workshops, FPL-related Planning, adaptive management (lessons learned), potential project/program concepts, and documents produced with CPS funding using the CPS Annual Metrics Reporting Table available at the link below:
CPS Annual Metrics Reporting Table

3) PIPER Performance Report Form

Please complete and submit the PIPER Performance Report form. A complete submission of your performance report will include the Performance Reporting Narrative and CPS Metrics Reporting uploads described above. Below is an example of how a CPS performance report can be completed in PIPER.

Performance Report Details

Questions	Metrics	Leveraging	Uploads	Submission

1. Is the project on schedule? Yes ⬍ *

> CPS funds have been used as described in the Bliss Bay Year "X" Workplan.

2. Are there any goals that may not be fully accomplished or metric targets that may not be met within the award time? No ⬍ *

>

If "YES" can those goals be accomplished and metric targets met with a time extension, modification of milestone dates, or other adaptive management strategies? N/A ⬍ *

>

If "Yes", please indicate whether you have communicated with Council staff. Select "No" if you need to have further discussion with Council staff. N/A ⬍ *

>

3. Please describe any adaptive management strategies you have implemented or plan to implement to help accomplish project goals and meet metric targets, including a time extension and/or modification of milestone dates. Please also be sure to update this information in the milestones reporting, if appropriate.

> N/A CPS Award

4. The metric values for your project are shown to the right. Update the "current" value for all metrics, as appropriate. [View]

5. Have you begun collecting observational data? N/A ⬍ *

> CPS Award

6. Are you on schedule to perform all data collection activities described in your ODP? N/A ⬍ *

> CPS Award

7. Have you submitted an updated ODP? N/A ⬍ *

> CPS Award

8. Is your ODP up-to-date? To answer yes, your ODP should accurately reflect all the information available about your planned and/or ongoing data collection and management activities, including the timing and schedule for data collection and management. N/A ⬍ *

If "no," briefly describe the needed revisions and indicate when an updated ODP will be provided.

> CPS Award

Example responses continue on the next page.

9. Is there information needed to complete your ODP that is still unavailable or TBD? [N/A ‡] *

If "yes", when do you expect this information to be available?

```
CPS Award
```

10. Are your data publicly available? [N/A ‡] *

If "no," when and how it will it be shared?

```
CPS Award
```

If "yes," how and where is it accessible? Is the associated metadata record in the Council's metadata record tool (MERLIN) up-to-date?

```

```

11. If you have developed any deliverables, reports, or publications (manuscripts in refereed journals, presentations, etc), have they been uploaded to PIPER? [Yes ‡] *

```
Presentations created as result of CPS funds have been uploaded with this Performance Report.
```

12. Leveraging information for your project are shown on the leveraging tab. Do you need to update your leveraging information? If yes, update the leveraging information, as appropriate. [View]

13. If co-funding has been identified for this project, are you on target to receive those funds? [N/A ‡] *

14. Have you updated your GIS files? [N/A ‡] *

If "yes," please describe what changed and why.

```
CPS Award
```

15. Have you met the requirements of any special award conditions applicable to this performance period? [N/A ‡] *

If "Yes", please provide a description of the special award condition requirements addressed.

```

```

16. Is this a Commitment and Planning Support (CPS) FPL-funded project? [Yes ‡] *

If "Yes", have you uploaded the CPS metrics table under the 'Uploads' tab of this performance report? Please also upload additional supporting documentation, as appropriate.

```
Yes, our Year 3 annual performance narrative has been uploaded along with the CPS Annual Metrics Table to this performance report.
```

17. Please provide a summary of work completed under this award during this performance period? (All awards (FPL, SEP, CPS)).

```
Please see the uploaded annual performance narrative document for a summary of work completed during this performance period.
```

[Save]

Be sure to click "Save" once you have entered your information in the PIPER form.

In addition to completing the PIPER form as described above, please also include the Performance Reporting narrative and metrics table uploads with your submission.

Once you have completed your Performance Report form and uploaded appropriate documents. You may submit your performance report by clicking the green button on the final tab of the report.

Appendix B: Award Closeout Performance Reporting

The final performance report submitted at the end of the period of performance for a RESTORE Council funded award is part of the process of "closing" an award. As there is not a separate PIPER "Close-out" module, grant/IAA recipients are asked to submit a final "Performance Report" in PIPER that includes additional "Close-out" uploads, as the final step in closing an award. Instructions for providing this final report are described below. You'll note many of these instructions are duplicative of the instructions for providing a Performance Report, areas that differ for the final "Close-out" report are highlighted in RED below.

Getting Started

To begin the process of closing out your award in PIPER, please log into PIPER at https://www.restorethegulf.gov/apps/piper. If you are unable to log into PIPER please contact the RESTORE Council helpdesk (helpdesk@restorethegulf.gov).

Upon logging in, select "Go" under the "Performance Report" module box as shown below.
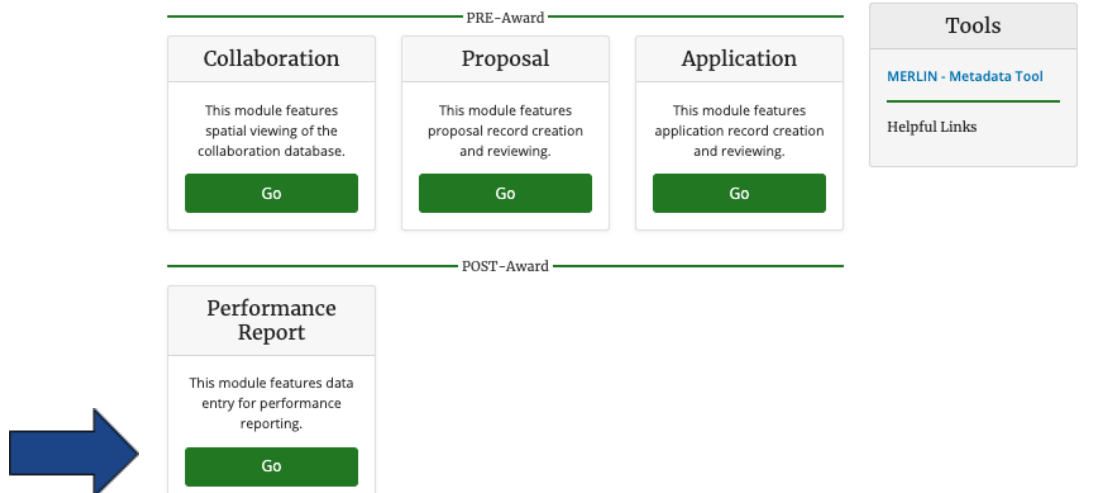
Creating a Final Performance Report
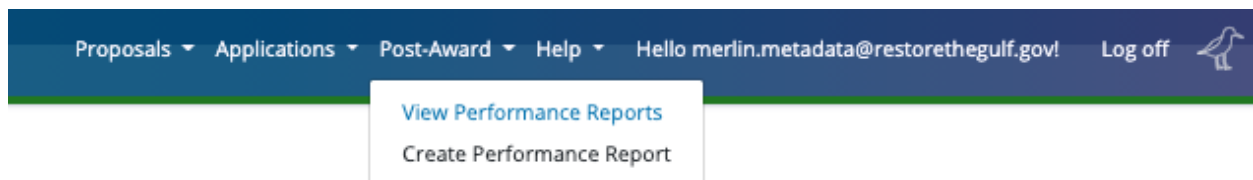
Step 1: Select the Post-Award tab at the top of the webpage. This will present you with two options: "View Performance Reports" and "Create Performance Report." Select "Create Performance" to begin.

Create Performance Report

Select an Awarded Application

Bliss Bay Submerged Aquatic Vegetation Rest ⌄

Application Details

Title:

Bliss Bay Submerged Aquatic Vegetation Restoration and Monitoring Program

Abstract:

The Gulf State Department of Conservation and Natural Resources (GSDCNR) will complete a submerged aquatic vegetation (SAV) restoration program in Bliss Bay; and an SAV comprehensive mapping and monitoring program for coastal Gulf State. These programs will speed the recovery of areas that have known losses of SAV beds, either by prop scarring or natural disasters, and provide GSDCNR with vital SAV status and trends data, allowing further investigation to the factors that influence historic SAV loss as well as observed fluctuations in SAV coverage. Additionally, mapping will provide critical SAV extent and species composition data for resource managers and regulatory agencies, better informing regulatory decisions, future restoration efforts and the need for additional long-term SAV monitoring, protection and restoration.

Activity Type:

Planning and Implementation

Requested Funding Amount:

875000

Create Performance Report

Step 2: You will then be taken to a page with a dropdown list titled "Select an Awarded Application" containing the awarded projects and programs for your agency. Once an awarded application is selected, details about that award will be displayed under "Application Details", including the application title, abstract, activity type, and requested funding amount. After selecting the appropriate application from the "Select an Awarded Application" dropdown, click the green "Create Performance Report" button in the bottom right of the page.

You will then be brought to a blank Performance Report, which includes a series of tabs, all of which will be explained in further detail in designated sections of this user manual. Some information in these tabs will be pre-populated with information submitted in your selected award application. You may save your progress by clicking the green "Save" button at the bottom of the Questions tab to enable you to return to your report if need be. You can return to an incomplete report by selecting "View Performance Reports" under the Post-Award tab on the top of the webpage. Select the pencil icon next to the report you want to edit, allowing you to resume performance reporting.

Performance Reporting Questions

The following questions are included as part of the Questions tab in the Performance Report. Please answer Yes, No, or N/A and provide explanations in the note sections where appropriate.

1. Is the project on schedule?

For closeout reporting, select "Yes" if the award is closing out on schedule, and "No" if the activities under the award were delayed during the award's period of performance. In the text box, please provide a brief explanation of delays experienced during the entire award period of performance (e.g. No-cost extensions, etc.).

2. Are there any goals that may not be fully accomplished or metric targets that may not be met within the award time?

For closeout reporting, select "Yes", if any of the project/program goals and/or metric targets identified when the activity was awarded will not be met. If "Yes", provide an explanation of the goals and/or metric targets not being met, and describe any factors or circumstances that may have played a role in project performance.

If "YES" can those goals be accomplished and metric targets met with a time extension, modification of milestone dates, or other adaptive management strategies?

For closeout reporting, enter the following text: "N/A - Final award closeout report."

3. Please describe any adaptive management strategies you have implemented or plan to implement to help accomplish project goals and meet metric targets, including a time extension and/or modification of milestone dates. Please also be sure to update this information in the milestones reporting, if appropriate.

For closeout reporting, provide a description of any adjustments to activities that were implemented to meet project goals and objectives (e.g. adjustments to budget spending categories, post-storm assessments, scheduling changes due to unforeseen events, feedback from partners/subrecipients). If the award is for an implementation activity, please also include a description of the anticipated duration of project benefits, and any uncertainties regarding them.

4. The metric values for your project are shown to the right. Update the "current" value for all metrics, as appropriate. Select "Yes" if you have updated your metric's "Current" values. Select "No" if there is no change to your metric values. Please see the Metrics Information section of this User Guide for additional guidance on updating your metric values.

For closeout reporting, the metric values entered under "current" should match or exceed the target metric values provided when the activity was awarded. If they do not, an explanation of the differences should be provided under Question #2 of the performance report.

5. Have you begun collecting observational data?   In the text box, please provide a brief description of the observational data you have begun collecting.

For closeout reporting, select "Yes" and indicate in the text box that details are provided with the Observational Data Closeout form (to be completed outside of PIPER and uploaded with your performance report). See below for additional information on completing the Observational Data Closeout form.

6. Are you on schedule to perform all data collection activities described in your ODP? (Observational Data Plan[3]) For closeout reporting, select "Yes" and indicate in the text box that details are provided with the Observational Data Closeout form (to be completed outside of PIPER and uploaded with your performance report). See below for additional information on completing the Observational Data Closeout form.

7. Have you submitted an updated ODP?

For closeout reporting, your response to this question will likely be "Yes" as a final ODP with updates on all contact information, metrics, and parameters is required before award closeout. See below for additional information on completing the Observational Closeout form.

8. Is your ODP up-to-date? To answer yes, your ODP should accurately reflect all the information available about your planned and/or ongoing data collection and management activities, including the timing and schedule for data collection and management.

For closeout reporting, your response to this question should be "Yes" as a final ODP with updates on all contact information, metrics, and parameters is required before award closeout. See below for additional information on completing the Observational Data Closeout form.

9. Is there information needed to complete your ODP that is still unavailable or TBD?

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[3] Projects using the ODP template released with the ODP Draft Interim Guidance will have a separate Data Management Plan (DMP). For these projects, reporting instructions that refer to the ODP should be taken to refer to both the Observational Data Plan and Data Management Plan. As of the release of the 2021 ODP Guidance, the DMP template is supplanted by the electronic ODP form, which includes fields for all information formerly provided in the DMP. Projects using the electronic ODP form released in 2021 will not have a separate DMP.

For closeout reporting, your response to this question should be "No" as a final ODP, with updates on all contact information, metrics and parameters is required before award closeout. See below for additional information on completing the Observational Data Closeout form.

10. Are your data publicly available?

For closeout reporting, your response to this question should be "Yes" as making data publicly available is part of RESTORE Council award conditions. See below for additional information on completing the Observational Data Closeout form.

If "yes," how and where is it accessible? Is the associated metadata record in the Council's metadata record tool (MERLIN) up-to-date?

For closeout reporting, your response to this question should be "Yes" as providing ISO 19115-compliant metadata for all funded activities is required for all RESTORE Council awards. Details about editing metadata records in MERLIN, the Council's metadata records creation tool are available at: https://restorethegulf.gov/merlin-landingpage. Please reach out to merlin@restorethegulf.gov for additional questions about accessing MERLIN or editing metadata records.

 See below for additional information on completing the Observational Data Closeout form.

11. If you have developed any deliverables, reports, or publications (manuscripts in refereed journals, presentations, etc), have they been uploaded to PIPER?

For closeout reporting, please indicate any deliverables that have been uploaded into PIPER. Additional details regarding any papers, reports, or publications may be described in the Observational Data Closeout form.

12. Leveraging information for your project is shown to the right. Do you need to update your leveraging information? If yes, update the leveraging information, as appropriate. Please see the Leveraging Information at Closeout section of this User Guide for additional guidance on updating your leveraging values for your final performance report.

13. If co-funding has been identified for this project, are you on target to receive those funds?

For closeout reporting, the response to this question should be "Yes". The RESTORE Council definition for "co-funding" specifies that "co-funding" indicates that the funding is required to complete the activity. Therefore, at award closeout all co-funding funds should be "received."

14. Have you updated your GIS files?

If "yes," please describe what changed and why. Note: At award closeout final GIS files that include geospatial data for all areas of activity under the award must be provided. See the Closeout Uploads Section below for additional guidance on providing your final GIS files.

15. Have you met the requirements of any special award conditions applicable to this performance period?

If "Yes", please provide a description of the special award condition requirements addressed. At award closeout all Special Award conditions for your award should be met.

16. Is this a CPS-funded project? CPS stands for Commitment and Planning Support. CPS awards were granted as part of the Council's Commitment and Planning Support Funded Priority List. If your award is a CPS award, the title of your record will begin with "Commitment and Planning Support." Please see Appendix A for additional information on completing a performance report for a CPS awards.

If your award is not a CPS award, you may answer "No", and leave the text box blank.

Note: Closeout instructions for CPS awards is in development, and will be provided closer to the time of CPS award closeout.

17. Please provide a summary of work completed under this award during this performance period.

Provide a brief summary of activities conducted under this award during the previous performance year. Note: For award closeout, please provide a summary of activities completed since the last performance report was submitted.

Before continuing to the next section of your performance report be sure to click "Save." Data may be lost when advancing to other tabs in your performance report without saving.

Final Metrics Information

1. **Application Metrics:** This area displays the Metrics selected in your project/program application along with the last previously updated "current" values for each (i.e., if you have previously completed a Performance Report). As a reminder, a description of Metrics can be found here. Note: If your Metrics have not pre-populated from your application or a previous Performance Report please contact helpdesk@restorethegulf.gov.

2. **Update Current Metric Value:** This allows you to update the "Current" value for each Metric included in your project/program award.

3. **Current:** Enter the current numerical status for this metric.

For closeout reporting, the metric values entered under "current" should match or exceed the target metric values provided when the activity was awarded. If they do not, an explanation of the differences should be provided under Question #2 of the performance report.

4. **Performance Report Metrics:** This displays the updated Current value(s) for each of your Metrics, when they were last updated, and by whom. The Approval Status can be either Pending, Approved, or Rejected. Pending indicates that either your Performance Report has yet to be submitted or that the RESTORE staff are still reviewing your submitted Performance Report. Approved indicates that your updated Current value(s) have been reviewed by RESTORE staff and were accepted. Rejected indicates

a problem with the Performance Report. In this case the RESTORE staff will reach out to the Report Point of Contact via email regarding the next steps.

Final Leveraging Information

1. **Application Leveraging:** This displays the Leveraging identified in your application along with the last previously updated values for each (i.e., if you have previously completed a Performance Report). Note: If your funding has not pre-populated from your application or previous Performance Report, or you need to add or delete a Leveraged Fund please contact helpdesk@restorethegulf.gov.

2. **Edit Leveraging:** This allows you to update your Leveraging information.

3. **Funding Amount:** Enter the updated total leveraged funding amount for the funding source described below. Note: Decimal value cannot have more than 2 digits after the decimal.

4. **Funding Type:** Use the drop-down menu to select the type of leveraging you are describing. The types of funding available are:

   Co-funding: Costs will be shared across funding from two or more sources. The leveraged funding from all sources is required in order to achieve the project or program objective. In cases where co-funding is to be used, the commitment of such leveraged resources is required prior to award of Council-Selected Restoration Component funds. There may be an exception to this rule in cases where a project could be scaled down in the event that the anticipated co-funding did not materialize. In such cases, the Council would need to consider whether an FPL amendment and/or award amendment would be needed to address the change in project scale;

   Adjoining: Activities are proposed in a location that adjoins another existing or proposed project. Geographic proximity is key to this type of leveraging of resources across projects;

   Builds on other work: The project builds upon activities completed or ongoing as part of other projects or programs but is not captured by either of the other two types of leveraging.

5. **Source:** Indicate the name of the agency/organization providing the leveraging funds.

6. **Source Type:** Use the drop-down menu to select the source type for the resources that may be leveraged with your activity.

7. **Status:** Use the drop-down menu to select the status of the leveraged funds being described. Options are Proposed (funds that have been proposed and may be provided in the future),

Committed (funds that have been committed to be received for the activity), and Received. Note: At award closeout all leveraging funds should be listed as "received". If funds were proposed, but never received, please revise the leveraged value amount for those funds to "0", and revise the status to "received."

8. **Description:** Provide a brief narrative for the leveraging funding information you are providing.

   Use the light grey square in the bottom right-hand corner of each text box to pull down and expand to desired size for better visibility and ease of writing. For closeout reporting, please update the leveraged funding description to indicate any change in the leveraged funding amount during the project's duration, and the reason for this change. For leveraged funding that was "proposed" when the award was made, but never received due to unforeseen circumstances, please provide an explanation for why those funds were not received (e.g. "Funds proposed for purchase of adjoining property were not received as property is no longer available for purchase by partner agency.")

9. **Performance Report Leveraging:** This displays the updated Leveraging information for each of your leveraged funds, when they were last updated, and by whom. The Approval Status can be either Pending, Approved, or Rejected. Pending indicates that either your Performance Report has yet to be submitted or that the RESTORE staff are still reviewing your submitted Performance Report. Approved indicates that your updated Leveraging information has been reviewed by RESTORE staff and were accepted. Rejected indicates a problem with the Performance Report. In this case the RESTORE staff will reach out to the Report Point of Contact via email regarding the next steps.

Final Uploads

1. **Application Uploads:** This displays the GIS and ODP files uploaded in your application or files you've uploaded since (i.e., if you have previously completed a Performance Report).

2. **Upload GIS Files:** Clicking this icon allows you to upload updated GIS files. Files types can be either .7Z or .ZIP. For award closeout: If your project location was changed during the period of performance e.g. (increased or decreased in size, specific locations were identified, etc.) or your award included a special award condition requiring final GIS data be submitted at closeout,
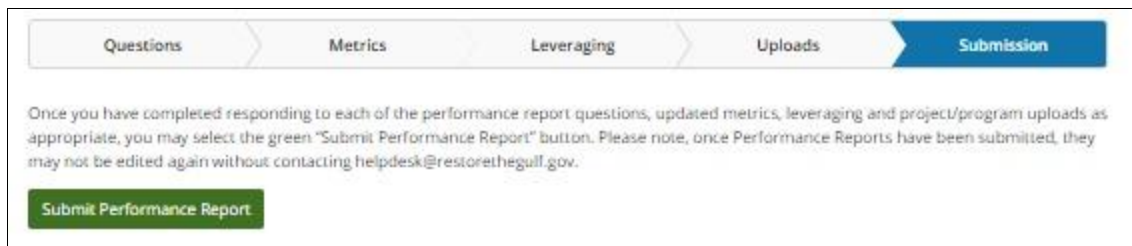
upload those files in this section. Please have the spatial data in the template format (template link) and update the metadata as needed.

3. **Upload ODP[4] Files:** Clicking this icon allows you to upload an updated ODP. Files types can be .PDF, .DOC, or .DOCX.

4. **Upload Additional Files:** Clicking this button allows you to upload additional files which may not fall in the GIS or ODP categories, such as reports, additional details about work conducted during this performance period, or the CPS award required metrics upload (See Appendix A for more information). Files types can be .PDF, .DOC, .DOCX, .7Z, or .ZIP.

   Note: For Closeout Reporting a Observational Data Closeout Report is required to be completed outside of PIPER, and uploaded as a PDF to PIPER. Please see the Observational Data Closeout Report Instructions below for additional information.

5. **Performance Report Uploads:** This section allows you to upload new files and displays newly uploaded files. The Approval Status can be either Pending, Approved, or Rejected. Pending indicates that either your Performance Report has yet to be submitted or that the RESTORE staff are still reviewing your submitted Performance Report. Approved indicates that your updated files have been reviewed by RESTORE staff and were accepted. Rejected indicates a problem with the Performance Report. In this case the RESTORE staff will reach out to the Report Point of Contact via email regarding the next steps.

Submission

When you are finished with your Performance Report click "Submit Performance Report". Your Performance Report will then be forwarded to RESTORE staff for review. Your report will either be accepted or rejected. If rejected the report will be opened back up to you automatically by RESTORE staff and you will receive an email detailing next steps.

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[4] Projects using the ODP template released with the ODP Draft Interim Guidance will have a separate Data Management Plan (DMP). For these projects, reporting instructions that refer to the ODP should be taken to refer to both the Observational Data Plan and Data Management Plan. For example, the DMP should be uploaded with the ODP file. As of the release of the 2021 ODP Guidance, the DMP template is supplanted by the electronic ODP form, which includes fields for all information formerly provided in the DMP. Projects using the electronic ODP form released in 2021 will not have a separate DMP.

Observational Data Closeout Report

An Observational Data Closeout Report is required as part of closing out all RESTORE Council awards. Some of the questions included in the Observational Data Closeout Report may be somewhat duplicative of the questions asked in the PIPER Performance Report form. We encourage recipients to use the Observational Data Closeout Report to provide more specific details regarding data collection activities and results, than is requested in the Performance Report Form.

To complete your Observational Data Closeout Report, please fill out and submit the Google form linked here.

This form is accessible without a Google account. Please note that the only way to save your responses between sessions is to submit the form. When you have submitted your form, you will receive an email confirmation containing your submission. This email will also contain a link where you may edit your responses.

Observational Data Closeout Report Questions

Section 1

1. **Email address:** Please enter the email address of the observational data steward completing the Observational Data Closeout report.

2. **Project Name:** Please enter the full name of your award. Be sure to match this name with the title recorded in PIPER.

3. **Project observational data closeout report submission date**: Enter the date of completion for this data closeout report, at which time all project activities should be considered complete.

4. **I have verified that the current values of metrics are up-to-date in PIPER and can be considered final as of the submission of this report.**

   Check box. See the Final Metrics Information instructions for additional information on final metrics reporting.

5. **I verify that the latest Observational Data Plan (ODP) uploaded to PIPER contains no inaccuracies, missing details, or TBD items, and may be considered final as of the submission of this report.**

   At award closeout the final version of the ODP should be uploaded along with the final Performance Report. See the Final Uploads instructions for additional information on uploading ODP documents.

6. **Have you completed observational data collection of all metrics and measures as of the submission of this report?**

At award closeout the observational data collection described for metrics and measures identified in the ODP using award funds should be completed. However, additional data collection may occur following closeout using funds outside of the award (see Question 7 below).

7. **If you anticipate ongoing observational data collection beyond closeout of this award, please describe these activities as well as plans for subsequent data management.**

Please describe any observational data collection expected to take place following award closeout. For example, this could include a long-term monitoring plan to be implemented using leveraged funds.

8. **I verify that the latest Data Management Plan (DMP) uploaded to PIPER contains no inaccuracies, missing details, or TBD items, and may be considered final as of the closeout date.**

If you are using the ODP form template released in the ODP Draft Interim Guidance, you are required to submit a separate DMP form. At award closeout the final version of the DMP should be uploaded along with the final Performance Report. Projects using the electronic ODP form released in 2021 will not have a DMP form, and should select the second response option. See the Final Uploads instructions for additional information on uploading ODP documents.

9. **I have made restricted-use data available to the Council in a digital, machine-readable and non-proprietary format as of the closeout date.**

All Council-funded activities are required to make their award data publicly available in a digital, machine-readable and non-proprietary format, unless it is restricted-use. Any restricted-use data should be provided to the Council before award closeout. Select "Not applicable" if there is no restriction on the use of data related to this project.

10. **I have made all other data related to my project publicly available in a digital, machine-readable and non-proprietary format as of the closeout date.**

See explanation for question 9.

11. **For each data type listed in your DMP, please describe how to access the data, providing links if possible. Data collected for each ODP measure should be included.**

Projects using the electronic ODP form released in 2021 will not have a DMP form, and should instead reference each of the data types from the electronic ODP. These data types should capture all data and derivative products generated under this award. Please provide a permalink for each data type, or if one is not available, provide as much detail as necessary to allow each data type to be readily retrieved based on your description.

12. **If you have not yet made portions of your data publicly available, please explain why and describe when and how it will be shared.**

If any data or derivative products generated under this award are not publicly available, please list them (excluding restricted-use data that has been made available to the Council, per item 9) and provide an explanation for each. Because all Council-funded activities are required to make their data publicly available in a digital, machine-readable and non-proprietary format, we recommend that projects not able to do so prior to closeout reach out to coordinate with Council staff in advance of submitting this closeout report.

13. **I have made metadata for my project publicly available in ISO-19115 Format.**

According to the Council's approved metadata standard, Council-funded activities are to provide award metadata in an ISO-19115 format.

14. **Please describe how to access your metadata, providing a link if possible.**

To assist with meeting the Council's metadata standard requirements, the Council provides an ISO-19115 compliant metadata record creation tool called MERLIN. Details about creating and editing metadata records in MERLIN are available at: https://restorethegulf.gov/merlin-landingpage. Please reach out to merlin@restorethegulf.gov for additional questions about accessing MERLIN or editing metadata records.

15. **Please list any papers, reports, or publications that make use of data related to this project and describe how they may be accessed.**

Note: This question is duplicative of a question on the final performance report for awards. Please use this section of the Observational Data Closeout Report to provide reference details (e.g., citations) for these items as well as for any additional papers, reports, or publications that may not have been uploaded to PIPER.

Section 2

Project measures - I

For each of the measures listed in the award Observational Data Plan please provide the following information:

1. **Measure name**
2. **Were the success criteria met? (e.g. targets)**
3. **What was the completion value?**

   Units must match the units described in the ODP.

4. **Please briefly describe any related results or findings, if applicable.**
5. **Is there an additional project measure?**

   By selecting "Yes" to this question, the Observational Data Closeout Report form will indicate that additional project/program measures are to be reported in. Selecting "No" indicates that there are no additional project/program measures to report on. When there are no more additional project/program measures to report on, please proceed to the Observational Data Closeout Summary section of the Observational Data Closeout Report form.

Observational Data Closeout Summary

1. **Based on your observational data, please provide a statement summarizing project achievements (including benefits supporting the project goals and objectives).**

   Provide a long-form, narrative response to this question.

2. **Please describe any lessons learned (including lessons learned from the results of your data or data collection activities) not already captured in your closeout reporting.**

   Provide a long-form, narrative response to this question, if applicable.

3. **Are there any other "next steps" that may be appropriate with regard to this or similar data collection efforts moving forward?**

   Provide a long-form, narrative response to this question, if applicable.

Observational Data Closeout Report Submission

When you have filled out all of the required questions (marked with red asterisks) in your Observational Data Closeout form, click the "Submit" button. This will save your responses and provide you with a copy via a confirmation email. To revise your responses, use the link provided in the confirmation email to reopen the form, and remember to click "Submit" to save any changes. You may repeat this process as needed.

Once you are satisfied with the responses in your confirmation email, please upload a PDF copy to PIPER. To do so, save the email as a PDF by opening the print menu and selecting "save as PDF" from the printer options. If you are unable to save, please request a PDF copy from Council staff that you may upload to PIPER.